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ABSTRACT

Based on fiscal year 1986 annual reports from 48 states, Guam, Puerto Rico, and the Virgin Islands, this report describes interlibrary cooperation and resource sharing activities supported by the Library Services and Construction Act (LSCA), Title III, funds. In response to the 1984 amendment to Title III (which required each state to include in its long-range planning a statewide resource sharing plan identifying interlibrary and resource sharing objectives), states reported the following activities: (1) the planning and evaluation of statewide automation programs for resource sharing; (2) the establishment and maintenance of computerized holdings lists of serials and monographs using the OCLC online database for bibliographic descriptions; (3) the conversion of bibliographic holdings to machine-readable records; (4) the automation of circulation and resource sharing systems; and (5) training and continuing education programs for planning and implementing technology-based activities and services. In addition, excerpts from selected annual reports provide brief descriptions of specific projects in the areas of planning and evaluation, network management, expanded support of communication networks, document delivery systems, converting bibliographic holdings to machine-readable records, automated circulation and resource sharing systems, continuing education, and staff development. (SD)

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Interlibrary Cooperation and Resource Sharing

Dorothy Kittel

In fiscal year 1986, funds appropriated for Title III were $16,881,000. As in other years, not all of this amount was expended in FY 86; some funds were carried over to FY 87. The following section is based on the annual reports for FY 85 received from 48 States, Guam, Puerto Rico, and the Virgin Islands. Only those activities supported in whole or in part with LSCA Title III funds are included. Therefore, many significant and well-known cooperative library activities are not part of this report.

The States reported expenditures of $16,914,363 from FY 85 carryover funds and FY 86 appropriated funds for Title III activities. These funds were frequently supplemented with funds from State and other sources. However, since Title III does not require the States to match the Federal grant, States are not required to report funds from other sources. For this reason, the amount of LSCA Title III funds expended is not given.

In carrying out their programs for planning, establishing, expanding, and operating cooperative networks of libraries, the State reports indicate that much has been achieved in responding to the 1984 amendment to Title III. The amendment required each State to include in its long-range program a Statewide resource sharing plan identifying interlibrary and resource sharing objectives to be achieved during the period covered by the program. The objectives included, but were not limited to:

1. Criteria for participation in Statewide resource sharing to ensure equitable participation in libraries of all types that agree to meet requirements for resource sharing;

2. An analysis of the needs for development and maintenance of bibliographic access, including databases for monographs, serials, and audiovisual materials;

3. An analysis of the needs for development and maintenance of communication systems for information exchange among participating libraries;

4. An analysis of the needs for development and maintenance of delivery systems for exchanging library materials among participating libraries;

5. A projection of the computer and other technological needs for resource sharing;

6. An identification of means which will be required to provide users access to library resources, including collection development and maintenance in major public, academic, school, and private libraries serving as resource centers;

7. A proposal, where appropriate, for the development, establishment, demonstration, and maintenance of intrastate multitype library systems;

8. An analysis of the State's needs for development and maintenance of links with State and national resource sharing systems; and

9. A description of how the evaluations will be conducted.

The development of new access and delivery systems so people may gain the knowledge and information they want or need, wherever it may be located, is and has been one of the goals of the LSCA Title III, Interlibrary Cooperation and Resource Sharing program. Activities undertaken during FY 86 leading to the achievement of these goals have included:

- Planning and evaluation of Statewide automation programs for resource sharing.
- Establishing, expanding, and operating networks.
- Interlibrary loan and document delivery services.
- Converting bibliographic holdings to machine-readable records.
- Automated circulation/resource sharing systems.
- Continuing education and staff development.

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Interlibrary cooperation and resource sharing programs carried on by the States are rarely isolated activities. Rather, they are most often projects joined together to form a broader Statewide resource sharing program. Excerpts from selected State FY 86 annual reports describing activities under Title III are presented below. For additional information and complete State reports from all States, contact the appropriate State library administrative agency.

Planning and Evaluation

Florida — The services of the Bureau of Interlibrary Cooperation, Division of Library and Information Services, established in FY 84 to facilitate the development of cooperative networks, were enhanced through the effective use of personnel, equipment, and travel funds. A library consultant was employed to provide guidance in resource sharing, consortium development, and administration. A computer operator maintained the operation of essential automated systems, such as OCLC and the State Library's interconnected CLSI system. Planning was greatly facilitated by the ability to pay for convening groups of key persons, such as the State Library Network Advisory Committee, the Board of Directors of the Florida Center for Library Automation, the personnel of the Florida Library Information Network, and others.

Massachusetts — The Southeastern Massachusetts Cooperating Libraries received a grant to conduct a needs analysis for future expansion of automated interlibrary resource sharing among public, academic, and special libraries.

Connecticut — The State Library contracted with RMG Consultants Inc., to conduct a study of existing local library methods of locating and obtaining library materials, and to produce a draft plan and recommendations for more efficient use of resources in Connecticut libraries.

Establishing, Expanding, and Operating Networks

Colorado — A grant was given to the Western Slope libraries to provide on-line access to their collections for all residents of Colorado and to maximize the use of Western Slope library resources before accessing other libraries in the State.

Alabama — A third-year and final grant was made to the Alabama Library Management Network to upgrade the hardware of the shared circulation system for the expansion of the network. This is now a fully operational, self-supporting consortium of four public library systems, three college and university libraries, three public school libraries, and one special library. The project has successfully linked the major resource libraries of North Alabama in a cooperative automated network with a full spectrum of smaller libraries.

Indiana — Area library Service Authorities (ALSA) are charged with providing three services: interlibrary loan, reference referral, and consultation/staff development. Project funds were used to support nine ALSA offices and the reference centers, including personnel expenses, and to provide delivery and other services to meet local demands. ALSAs continued to exploit software capabilities for improved management control and refinements in resource sharing. ALANET was made available to all ALSAs. Experiments in lateral interlibrary loans via microcomputers were conducted.

North Carolina — The first North Carolina network service, the North Carolina On-line Union Catalog, became operational in May, 1986, via OCLC. The North Carolina On-line Union List of Serials, also built and maintained by OCLC, became operational in the fall. The third service, a Statewide electronic mail and bulletin board system, was contracted with Western Union and training was held for participating libraries.

Massachusetts — A grant was made to the Central-Western Massachusetts MARS, a consortium of 28 public and academic libraries, which uses automated technologies to facilitate resource sharing among member libraries. Project activities included acceptance of 14 new member libraries in the consortium, installation of central-site computer equipment for new members (central processing unit, disk drives, multiplexors), and expansion of resource sharing services by using local terminals connected to the central site via telecommunications. Over 1 million volumes were added to the database, increasing it by 20 percent. Inter-library loan turnaround time for the newly added members has decreased by at least 15 percent.

Michigan — The State Library of Michigan made subgrants to 14 multitype Regions of Cooperation (ROC). A few examples are:

- The Capitol Area Network used its grant to: 1) create machine-readable records of monographic holdings; 2) support electronic communication among member libraries for interlibrary loan and routine communications; 3) conduct a study to determine the feasibility of a shared automation system of the holdings of the Jackson District Library and the Jackson Community College Library; 4) provide member libraries with copies of the updated version of the Michigan Library Consortium's Union List of Serials; and 5) support continuing education in the field of educational technology.
- Macomb ROC: 1) expanded the regional database of monographic and serial holdings by adding the records of three hospital libraries; 2) expedited the interloan and delivery of materials by installing a new telefacsimile machine; and 3) purchased Apple computers for all member libraries to establish an electronic mail system.
- Lakeland Area Library Network: 1) provided reimbursement to net lenders and supported access to the University Microfilm Article Clearinghouse for all members of the library network; 2) produced the LAKENET Union List of Serials from OCLC and distributed it to member libraries; and 3) continued purchase of equipment to establish faster electronic communication among member libraries.

Interlibrary Loan And Document Delivery Service

Florida — Grants were made to : 1) Florida State University Strozier Library to purchase, install, operate, and maintain a telefacsimile unit for services related to the transmission of requested information and materials to and from members of the Florida Library Information Network (FLIN); and 2) the Jacksonville and Tampa-Hillsborough Public Libraries to provide services required for telefacsimile transmission of delivery of requested information and materials, free of charge, to other Florida libraries participating in the FLIN program.

New Jersey — A grant was made to the New York Metropolitan Reference and Research Library Agency (Metro) for partial reimbursement for film and video interlibrary loan delivery services to and from New Jersey Metro members. The delivery service was increased to three times per week for all New Jersey Film Co-op members, thus decreasing shipping time throughout the system and leading to an increased availability of these resources to member libraries.

Michigan — Funds were used to expand the newly established telefacsimile network in order to facilitate high-speed document delivery. The equipment is being used for both document delivery and interlibrary loan activity. In areas of the State where the costs of electronic communication make electronic bulletin boards cost-prohibitive, the telefax is a real success. Health science libraries are very pleased with the speedy delivery of documents. Telefax has played a role in some literally life-threathening situations.

Ohio — A pilot delivery system was initiated in two separate areas of the State. The project has studied the potential enhancement of reference services and resource sharing of biomedical literature among libraries of different types in Ohio. Two multitype networks, each centered around a major medical library, were created to serve as the central points for access by public, academic, and special libraries in each network. Participating libraries have used telefacsimile technology in an effort to increase reference services and resource sharing, and to speed delivery of requested materials. Activities in FY 86 covered only 4 months of a 13-month project. During this period, tele-facsimile equipment was purchased and installed at 17 libraries in 12 counties, brochures were designed and printed to publicize the project, and an advisory committee developed and finalized interlibrary loan guidelines to be used by participating libraries.

Converting Bibliographic Holdings To Machine-Readable Records

Massachusetts — Falmouth Public Library received a grant to develop a union list of serials for public, academic, special, and school libraries on geographically isolated Cape Cod. Using project personnel, holdings of 41 libraries of all types were processed through OCLC, with 500 of those titles unique to Cape Cod and the Islands. Over 7,000 titles were inputted. In the first 2 months of use, the interlibrary loan rates increased 45 percent. An additional result was the founding of the Cape Cod Inter-Library Association (CCILA), representing all libraries on Cape Cod, which will request LSCA FY 88 funds for a circulation control system to further facilitate resource sharing.

New York — Grants were made for projects furthering database development objectives.

- The Capitol District LRC converted 13,000 bibliographic records of 15 public, academic, school, and special libraries into the OCLC database.
- The Long Island LRC converted 13,333 bibliographic records from six Long Island academic libraries, and also provided for the creation of a CD-ROM regional catalog of the holdings records of the Nassau Library System, the Suffolk Cooperative Library System, and the Long Island LRC's OCLC libraries.

Delaware — An entirely new edition of the Delaware COM catalog was produced, describing 603,733 titles held by libraries throughout the State. Funds were used for additional retrospective conversion of existing card catalogs in the libraries of the Delaware Technical and Community College (2 campuses) and the Widener University.

West Virginia — Cataloging data accessible to West Virginia users has been expanded to include the three million records in the Library of Congress MARC database by linking these files, stored on laser discs, to the West Virginia (WV) Union Catalog database. Each user first searches the WV databases to determine if a record already exists. If it is not there, they may search the LC database using the LC card number or a title/author search. If the record exists on the LC database, it is copied into the WV database, the searcher's location code added, and downloaded to the local system.

Automated Circulation/resource Sharing System

Washington — The Spokane County Library District received a grant to undertake a comprehensive telecommunications system study for the Spokane Cooperative Library Information System (SCOLIS). SCOLIS is a computer-based network linking five major area libraries in sharing resources and circulating materials. Since the development of on-line services in 1981, the network has grown rapidly over the five intervening years to meet both anticipated and unanticipated needs. As a result, the system has reached its capacity before its time. The communications system was state-of-the-art, using leased telephone lines and a variety of communications interface devices — an extremely expensive method of providing data communications, with average monthly line charges exceeding $3,000 for the five agencies. The study provided SCOLIS members with a thorough analysis of the network and the implementation of recommendations has begun.

Florida — Small grants were made to local libraries to improve the quality of interlibrary loan services offered by the libraries. Ranging from $1,266 to $10,000, the grants were used to purchase equipment and software to enable them to access the Florida Library Information Network (FLIN), to train staff, and to pay for system-use fees associated with the ILL and resource sharing activities of FLIN.

Alabama — Muscle Shoals Regional Library received a grant to extend the automated circulation system to four more libraries and to finish loading holdings information and patron information onto the database. With the addition of new terminals and light pen readable patron cards, the plan for total automation was completed within 2 years.

Continuing Education And Staff Development

California — The Peninsula Library System completed a 3-year program of work with People's Computer Company, a nonprofit organization, for a series of seminars on computer literacy. Programs this year included: "Computer Comfort," "Train the Trainer," and "On-line Communication Information Services." Staff from all types of libraries participated. The program has proven cost effective and has aided the State in sponsoring clusters of training in many areas over a period of time. Many participants stated that they gained the confidence and structure necessary to effectively provide computer training, as well as techniques they can use in other presentation areas.

North Carolina — The North Carolina Library Staff Development Program grew out of an LSCA Title III supported project, "Continuing Education and Staff Development." It began operation under contract with North Carolina Central University's School of Library and Information Science (NCCU/SLIS). The program operates with an Advisory Council, which is composed of practicing librarians from all sections of the State. All types of

libraries, library specialties, and Statewide library organizations are represented on the Advisory Council. During 1986, four other library education programs decided to join the NCCU/SLIS continuing education programs (University of North Carolina — Chapel Hill, UNC — Greensboro, Eastern Carolina University, Appalachian State University, and North Carolina Central University). The deans of the schools serve on the Advisory Council and form an Executive Advisory Policy Group for the program. The program is the first cooperative venture of the State's five library education programs. It is a major effort to involve the State's major library training and education providers in better planning among themselves and with their constituencies, so that duplication of effort is decreased and timely events are offered as conveniently and inexpensively as possible. During the first year, 40 programs reaching 784 individuals were offered. Individuals from all types of libraries participated in the workshops, which offered a variety of topic areas at a variety of levels.

Virginia — The Lynchburg Area Library Co-Operative conducted five workshops on the following topics: public relations for library personnel, gift materials, cataloging of audiovisual materials, and business reference sources and services. A total of 188 people participated in the workshops, representing 18 libraries including academic, school, public, hospital, and special libraries. Overall, the workshops received positive evaluations and library directors indicated that participating staff members were, or soon would be, applying the knowledge and techniques acquired.